



2020-2021 Leadership Development Institute Grant Program Reimbursement Policy

Maximum Reimbursement Amounts for the Leadership Development Institute Grant Program

Multiple District Level:	<ul style="list-style-type: none">• USD \$4,500.00 (not to exceed actual expenses incurred)
District Level:	<ul style="list-style-type: none">• Up to USD \$1,800.00 (not to exceed actual expenses incurred)
Undistricted Provisional District/Region/Zone	<ul style="list-style-type: none">• Up to USD \$750.00 (not to exceed actual expenses incurred)

Required Reimbursement Documentation

To receive reimbursement from the Leadership Development Institute Grant Program the following must be submitted to the Leadership Development Division at Lions Clubs International:

1. A completed 2020-2021 Leadership Development Institute Grant Program Application must be on file with the Leadership Development Division
2. A completed Leadership Development Institute Grant Program Reimbursement Form.
3. Copies of receipts for eligible expenses
4. Leadership Development Daily Attendance Sheet (with participant and faculty signatures as verification of attendance)
5. Participant Evaluations and Final Institute Evaluation Report

It is imperative that the completed Reimbursement Claims and supporting documents are submitted promptly and received by the Leadership Development Division within **60 days** of completion of the institute in accordance with Lions Clubs International policy.

IN ACCORDANCE WITH LIONS CLUBS INTERNATIONAL POLICY, REIMBURSEMENT CLAIMS RECEIVED MORE THAN 60 DAYS AFTER THE CONCLUSION OF THE TRAINING PROGRAM MAY NOT BE ELIGIBLE FOR REIMBURSEMENT

Expense Reimbursement Eligibility

Eligible:	<ul style="list-style-type: none">• Hotel guest rooms – receipt must include the name of the participant or faculty guest• Meals associated with the program – receipt must include itemized list of food and beverages served• Program materials and supplies• Meeting room and audiovisual equipment rental• Faculty travel expenses
Not Eligible:	<ul style="list-style-type: none">• Alcohol• Participant travel expenses (i.e., airplane, bus, train, automobile mileage, etc.)• Incidental expenses (i.e., telephone, laundry, car parking fees, tips, travel insurance, etc.)



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Expense Budget Guidelines

A list of possible expenses related to the delivery of the institute is below, consider these factors when creating a budget.

Training Facility Expenses:

- Sleeping rooms (single or shared)
- Meeting rooms rental (including set-up/break down fees)
- Meals during the institute – Breakfast, Lunch, Dinner, AM/PM Breaks
- Rental equipment:
 - LCD projector and screen
 - Laptop
 - Flip chart/paper/markers
 - Microphones/Audio
 - Wi-Fi/Internet Access in the meeting room

Faculty Expenses:

- Transportation, Meals & Lodging

Supplies

- Signage, name tags, and certificates
- Binders with tabs (one for each participant and presenter)
- Curriculum materials (to be put into binders)
- Miscellaneous office supplies as needed (i.e., pens, paper, tape, Post-Its, etc.)

NOTE: Individual faculty members and participants are responsible for payment of incidentals (e.g. laundry, video rental, telephone, internet service, sundries, entertainment, participant transportation, alcohol, including mini-bar in room, etc.).

Reimbursement Notes

- Maximum reimbursement amount for the Leadership Development Institute Grant Program will not exceed actual expenses incurred.
- To be eligible for reimbursement, participants must participate in the entire institute and sign the completed Leadership Development Daily Attendance Sheet.
- Reimbursements will be made in the currency of the domicile of the multiple district, single district or undistricted provisional district/region/zone except when the best interests of the Organization require otherwise (per Board Policy). Reimbursement will be made at the Lions official exchange rate based on the date the claim is processed by Lions Clubs International Headquarters. Reimbursement will be made in U.S. dollars if the Organization does not have a bank account in the country of the multiple district, single district or undistricted provisional district/region/zone.
- Wire transfers for reimbursement will not be issued to personal accounts.
- If currency from more than one country is used, separate claims must be completed for each currency.
- The expenses for district guests and spouses of participants and faculty **are not** eligible for Lions Clubs International reimbursement.

Insurance:

Lions Clubs International provides no medical insurance coverage to its members whether or not on Lions business. Therefore, when traveling on personal or Lions business, it would be wise to make sure that you have sufficient medical insurance coverage. Many individual and group insurance plans do not cover the insured outside his/her own country, and sometimes not even outside of his/her city, state or province. This is especially true of USA Medicare insurance (which is effective in the USA only) and is also probably true in many other government sponsored and individual medical plans. This is a personal matter, which varies from individual to individual, so please be sure to examine your own situation and that of family members and friends carefully.



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Leadership Development Institute Grant Program Reimbursement Checklist

NOTE: Reimbursement claims missing all or part of the items listed below will not be processed.

- ☐ 2020-2021 Leadership Development Institute Grant Program Reimbursement Form
- ☐ Itemized invoices and receipts, ensure currency used is legible. Please do not convert currency
- ☐ Final Evaluations including:
 - 1. Individual participant evaluations with comments.
 - 2. Final Institute Evaluation Report including recommendations for improving and/or adding content.
- ☐ Completed Leadership Development Daily Attendance Sheet with all participant and faculty's signatures.

The Institute Coordinator is responsible for ensuring each participant and faculty's first name, last name, club number, membership number and signature is on the Leadership Development Daily Attendance Sheet.
- ☐ Optional:
 - 1. Photos – ensure that the photo consent is provided by way of signature on the Leadership Development Daily Attendance Sheet. All photos should be labeled and identify all Lions in each photo.
- ☐ Please send all documents to:

By email to the Leadership Development Division at leadershipdevelopment@lionsclubs.org

By mail:
Lions Clubs International, Leadership Development Division (LD Institute Grant)
300 W. 22nd Street
Oak Brook, IL 60523-8842 USA



2020-2021 Leadership Development Institute Grant Program Reimbursement Form

Multiple District/Single District # _____

Date of Institute: _____

Undistricted Provisional District/Region/Zone Country

Location of Institute: _____

Type of Institute:

☐ Emerging Lions Leadership Institute (ELLI)

Institute Coordinator Name: _____

☐ I represent to the best of my knowledge and belief that all expenses listed were actually incurred and are in conformity with the Associations' Leadership Development Institute Grant Program Reimbursement Policy. I understand that by virtue of signing this reimbursement claim, it becomes a part of the Organization's official records and may be subject to review by parties normally allowed to make such inspections. I also understand that claims received more than 60 days from date of training may not be eligible for reimbursement.

Institute Coordinator Signature

- Please list below all eligible expenses for reimbursement and attach corresponding receipts to this form.
- Document expenses in currency actually paid. **Do not convert currency.**
- Reimbursement will be made payable to the applicable multiple district/district.

Expense Category		Notes	Total
Faculty Number attended: _____	Travel (i.e., airplane, bus, train, automobile mileage, etc.)		
	Sleeping Rooms (attach individual folios) – individuals responsible for incidentals (i.e. laundry, video rental, telephone, alcohol, including mini-bar in room, etc.)		
Participants Number attended: _____	Sleeping Rooms (attach individual folios) – individuals responsible for incidentals (i.e. laundry, video rental, telephone, alcohol, including mini-bar in room, etc.)		
Training Facility	Meeting Room Rental		
	Meals and Breaks		
	Audio visual equipment rental		
	Material costs (photocopies, supplies, signage, postage)		
	Other (please specify expense in notes column)		
Currency Used:		Total Expenses:	

Submit completed Leadership Development Grant Program Reimbursement documents to the Leadership Development Division at Lions Clubs International.

By email: leadershipdevelopment@lionsclubs.org

By mail: Lions Clubs International, Leadership Development Division
300 W. 22nd Street, Oak Brook, IL 60523 USA



Leadership Development Daily Attendance Sheet (Information below will be reported to Lions Clubs International. *)

Multiple District/Single District/District # _____ Country: _____ Date of Institute/Training: _____

Location of Institute/Training: _____ Type of Institute/Training: _____

If the participant list is missing membership numbers and/or signatures, the list will not be accepted. Your final reimbursement may be reduced if Lions Clubs International is not able to verify the participant information.					My signature below confirms my attendance at the above institute/training program and my photo consent. *			
	Name	Title	Club Number	Member Number	Photo/Video Consent* (signature)	Day 1 (signature)	Day 2 (initial)	Day 3 (initial)
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								

*Photo Consent: By signing this form, you authorize that any photographs/videos taken of you at this institute/training can be used by Lions Clubs International for the purpose of printed, digital, video or other mediums for the purposes of promotion and publicity for Lions Clubs International. Those images shall be the property of LIONS CLUBS INTERNATIONAL for all use.

*Reporting: The information shared will be recorded to ensure individual Leos and Lions are given credit for attending training events. If you have any questions on how this information will be used, contact Leadership Development (leadershipdevelopment@lionsclubs.org).

Global Action Team – GLT Coordinator: Completed training should be reported monthly via the Local Training Reporting Tool. The Local Training Reporting Tool is part of the “Learn” application within the Lions Clubs’ digital ecosystem. Access is available on the Lions Clubs International website by selecting the Member Login link and using your individual Lion Account login and password.



Leadership Development Final Institute Evaluation Report

Final Institute Evaluation Report

Submit a Final Institute Evaluation Report including the following information:

1. A summary of all participant and faculty institute evaluations, including comments
2. A report of the overall institute by the institute coordinator, including recommendations for program improvements and/or topic suggestions.
3. Required signature: Institute Coordinator is required to sign below

☐

I understand that by virtue of signing this final institute evaluation report, it becomes a part of the Organization's official records. My signature confirms that I have received and reviewed the final institute evaluation report and to the best of my knowledge and belief, all information has been provided.

Printed Name

Signature

Date